

International Service Organization of COSA Board of Trustees

2018 Annual Report to the Delegates



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Oakland, California

May 25, 2018

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## **Letter from the International Service Organization of COSA Board Chair**

Hello to COSA Delegates and Registered COSA Meetings,

Right now, I am keenly aware that all things come to an end. I just learned my dad is at the end of his life. And I am in the final months of my term as chair of this board.

There is a capable, brilliant, and willing person stepping into the role of chair this coming service year. I hope you will welcome her and support her as she begins this new work.

Sandy has served our board well as secretary and vice chair. She is responsible, respectful, a lovely human being, and grateful for what COSA has given her.

I am also grateful for the growth COSA has brought to my life. I have spent more time around my father lately as his health has declined. This has sharpened my awareness of the ways I have changed since entering the program, and since I joined the ISO of COSA board.

My Higher Power has lifted many of the character defects I learned to use as coping mechanisms during my childhood. Many but not all. I think I can listen better than I used to be capable of. I have an improved ability to live in uncertainty, or the dark, as I often call it. And I have been shown over and over that I don't always know best.

I have been taught by all of you and by those serving beside me. We had a productive year with a hardworking crew of board members and committee members. You will find the details of our work in these pages.

As I say goodbye to this role and to my father, the details of what I gained from each will come into focus slowly. Right now, I am in the dark about what it will look like on the other side.

It reminds me of being a newcomer, showing up at a meeting, not knowing what to expect. But showing up is the most important part.

You've done that by attending the annual meeting, going to the convention, or just by taking a chance on COSA.

For me, it's time to let go, to make space for something else to dig into, whatever that something else is. Six years ago, it was time to let go of my marriage. Five years ago, it was time to dig into service. Four years ago, it was time to dig into a new relationship. Three years ago, it was time to dig into service as board chair. Two years ago, it was time for me to dig into a major construction project at my house. One year ago, it was time to dig into getting another dog. This year, I am letting go, and I am waiting for my next endeavor. Patiently, in the dark.

Thanks for the opportunity to serve our fellowship.

Emily G.  
International Service Organization of COSA Outgoing Board Chair

**2017-2018 International Service Organization of COSA  
Board of Trustees  
and their Committee Service Roles**

Ann Marie V., Casselberry, FL  
ISO Board Member, Board Secretary, Nominating Committee Member

Beth H., Mesa, AZ  
ISO Board Member, Literature Committee Chair, Board Contact for Delegate Liaison

Emily G., El Sobrante, CA  
ISO Board Member, ISO Chair, Supervisor to ISO Central Office Manager, Nominating Committee Member, Budget and Finance Committee Member, Outreach Committee Member

Eric C., Tucson, AZ  
ISO Board Member, Resource Development Committee Chair

Joey Z., Oviedo, FL  
ISO Board Member, Technology Committee Chair, Board Liaison for Convention Committee

Sandy S., Laguna Hills, CA  
ISO Board Member, ISO Vice Chair, Nominating Committee Chair, Outreach Committee Member

Wendy W., Tucson, AZ  
ISO Board Member, ISO Treasurer, Nominating Committee Member

## **International Service Organization of COSA Board of Trustees Overview of Board Activities Annual Report 2018**

The International Service Organization of COSA Board has been hard at work for you. Here's what we've done this service year.

### **Review of Bylaws**

The board spent the year reviewing the bylaws of the International Service Organization (ISO) of COSA. It was an extensive project that required all hands on deck. It is a requirement stated in the bylaws that the board review the bylaws every three years to make sure they still fit the fellowship's needs and the current structure of the ISO. The last known board review and change to the bylaws occurred in 2010, so we were overdue. We have decided to propose several changes which delegates will be voting on at the 2018 Annual Delegate Meeting. Changes proposed include limiting the number of board members to 12 (down from 21); an overhaul of the rules associated with revising Steps, Traditions, and Concepts; changing a deadline for financial reporting to be more in line with our actual accounting schedule; eliminating the possibility for accounting records to be kept at a COSA member's home given our ability to manage our books online; and clarifying the rules for meetings regarding delegate selection. There are also a few typographical changes suggested that are not substantive in terms of their impact on the meaning of the bylaws.

### **Meeting Updates**

Another year-long project was updating our records on individual meetings. The technology committee led the way on this. Initially, we reached out to all of our meetings via email to confirm the information we had was accurate. If we did not hear back, we reached out again via email, and then sometimes via phone. At this time, we have just a few meetings that we have not heard back from. Quite an accomplishment given there are 138 meetings worldwide. This means the meeting information we have on the website is current, helping newcomers find meetings when they need them.

### **Finances**

The donated funds from groups and individuals have allowed the International Service Organization of COSA for the first time to raise the ISO's prudent reserve to \$20,000 (formerly \$10,000). The new amount is just above the three months' worth of operating funds our guidelines tell us to have set aside. At this time, we are looking at investing our prudent reserve as well as the money we have set aside for our upcoming basic text. We hope to invest it conservatively in a way that poses no risk of loss and allows the ISO to draw on the funds when they are needed.

### **Revived Committees**

Both the outreach committee and the resource development committee became active again this past service year, after a few years in dormancy. The outreach committee is working on offering materials to individual meetings so they can carry the message in their individual communities. The committee also sponsored the attendance of a COSA at a conference for therapists in the United Kingdom. The committee also updated the "Letter to Professionals" on our website. This is another important tool for local groups spreading the word about COSA in their communities. You'll find that here: <http://cosa-recovery.org/professionals.html>. The resource development committee is focusing on creating a planned giving program for COSAs who wish to include the ISO in their wills and trusts.

## **New Recruits**

The nominating committee had good success seeking candidates for board service. They recruited and approved three nominees for the coming service year. The committee also replaced outgoing trusted servants who answer incoming emails and phone calls. We appreciate all those who have volunteered to serve as well as those who completed their service in these roles.

## **Website**

Our website is seeing some improvements. We now have an archive of the ISO's emails to the fellowship here: <http://cosa-recovery.org/archive.html>. We have also improved the technology that allows us to take donations, both one-time and monthly gifts. If you are currently giving through PayPal, we encourage you to switch over to the new system by signing up on our website and concluding the PayPal payments. This allows for better management of your donations and the ISO receives a bigger portion of your donation. Just click the *Donate* button on the front page of our website to set it up. We are also looking at changing the home page of the website to make it more accessible to newcomers.

## **Donations**

For those giving through our website (not via PayPal), we have a new system that updates expired credit cards for us. That means that if you wish to end your monthly contribution, you must contact us directly at [iso@cosa-recovery.org](mailto:iso@cosa-recovery.org) to cancel it.

## **Literature**

Work continued on our basic text. The literature committee is presenting four chapters of the basic text for delegate approval this year. The fellowship had a chance to weigh in and provide feedback on those chapters over a 90-day period. Delegates will be voting on the revised versions of those chapters. The fellowship also got a chance to give feedback on a revised version of the Confidentiality Statement presented at the 2017 Annual Delegate Meeting. The board took the feedback received at the meeting and produced a new version for the fellowship to review over 90 days. Delegates will be voting on that new version at the 2018 Annual Delegate Meeting.

The board is also looking at the possibility of releasing a collected version of the Step booklets. We would like to make a collected version without making any changes to the booklets themselves. This is unconnected to the basic text which remains in progress.

Also, we did a preliminary review of how to potentially implement gender-neutral language guidelines for our literature.

The board voted to raise prices on existing COSA literature this year. On August 1, 2017, the price of most booklets went up 50 cents to \$3.00 and newcomer packets (a set of four brochures) rose 50 cents to \$1.50 per set. The last price increase was in 2011. Income from literature sales is crucial to helping the ISO remain self-supporting.

## **Delegates**

After considering delegate feedback from the 2017 Annual Delegate Meeting, we decided to carve out time at some of the delegate video chat meetings to focus just on new delegates. That way, returning delegates don't have to sit through information they have already heard and new delegates can feel free to ask anything they'd like. We are also hoping to improve the sound quality for Zoom delegates, though we may inadvertently face this challenge again as we switch locations every year. We are putting someone in charge of managing speakers at the podium in

order to improve the sound quality for all attending. We have also streamlined convention and delegate registration. There used to be two separate registration processes and now there is one.

**Anonymous Mail:** Feedback from a COSA member via email prompted the board to decide to ship literature and mail more anonymously. The return address label will no longer contain a reference to the ISO of COSA or the COSA logo.

In all, the board has created 138 action items since May of 2017, and completed a good chunk of them. This report is being written in mid-March.

## **International Service Organization of COSA Board Committee Reports**

### **Budget and Finance Committee Annual Report 2018**

The Budget and Finance (B&F) Committee vision for the 2017-2018 service year was to continue with our thorough review of money transfer systems and establish a system for online record keeping. In order to fulfill our vision, we needed to obtain active members who are interested in the following positions: QuickBooks specialist, budget specialist to facilitate annual budgeting process, and monthly account reconciler.

#### **Accomplishments**

We have completed a thorough review of money transfer systems and find it in the financial interest of COSA to move all recurring payments to the Authorize.Net site. In addition, a system has been established for online record keeping to facilitate uploading all expense and reporting documents directing into QuickBooks. We now have an active committee member who is dedicated to reconciling all COSA accounts monthly. We also secured a QuickBooks specialist who is learning all of the processes of the Budget and Finance Committee. The current treasurer is working with these two new team members to facilitate the transfer of this committee to a new treasurer for the 2018-2019 fiscal year.



## **Convention Committee Annual Report 2018**

At the start of the service year, the Convention Committee (ConCom) identified several goals. The first was to continue to improve committee work processes so planning can be rolled over to the following year with greater ease and less recreating of the wheels on what is a fairly regular but quite dynamic annual plan for our conventions. With a careful eye to our Traditions and Concepts, these process improvements have been available to help all committee members better manage, track, and coordinate their work. Our second and third goals, to increase both overall attendance at ISO of COSA conventions and the number of newcomers in attendance, are closely linked and are the central focus of our programming and outreach plans. In addition to these larger goals we set an intention to give all ConCom members an opportunity to experience the benefits of Twelfth Step service, discover how to have some fun while doing so, and to feel the blessings that come from acceptance when we make mistakes along the way.

We had between 30 and 35 active members on the committee, playing the many roles necessary to plan a convention. With a committee this size we found it challenging to find a meeting day and time that worked for everyone so we chose the regular meeting time based on the availability of key members (ConCom co-chairs, secretary, treasurer, vice chair, subcommittee chairs, and a couple other key individual contributors). Anyone else who was willing, interested, and available to attend was welcome and invited to join the meeting. This seemed to work well for everyone. We held a one-hour meeting every month (except December) via Zoom video conferencing technology; most attended via video and some via the audio-only phone-in feature. There were many committee members from the greater San Francisco Bay Area as well as members from across the country.

The ConCom co-chairs and vice chair met prior to most monthly meetings to prepare for them. They reviewed their current planning status as well as provided coaching guidance for the vice chair's action items for the following year's convention. Between monthly ConCom meetings, co-chairs also met one-on-one (at least once a month) with subcommittee chairs and individual key roles (SAA liaison, outreach liaison, secretary, treasurer, etc.) to touch base on progress with their action items and provide individualized support. The level of support varied based on how much experience the person had with ConCom work and the complexity of their role. More than 100 action items have been completed as of now, and we expect the total of action items completed to be over 175.

We relied on COSA's Twelve Steps and Twelve Traditions to guide us in our service work and set aside time at each of our monthly meetings to deepen our understanding of COSA's Twelve Concepts through shared discussions of how we might apply the Concepts in both our committee service work and our personal lives.

It has proven to be helpful to use a co-chair model (both for the committee as a whole and at the subcommittee chair level) as it makes the workload more manageable and affords a backup in the event of attrition over the course of a year. We have found this model also offers an excellent reminder to seek group conscience on decisions whenever possible. In response to growing limitations with Yahoo Groups, which is what ConCom has relied on for some years now, we have migrated over to Google Groups. This seems to be working better for all.

We have been pretty much on schedule over the course of the year: updating registration

materials and opening registration by December of 2017; recruiting volunteers to lead or join sub-committees; updating workshop & speaker nomination forms and getting them posted on the website; updating website postings throughout the planning cycle: timely use of fellowship emails to communicate to the fellowship as a whole; submission of articles to each *Balance* during the year-long planning cycle; etc.

For the first time, we plan to use Zoom video conferencing to allow people to attend speaker events remotely. We also hope to use that platform for COSAs to participate remotely in convention workshops in the future as well. We are grateful for the opportunity to collaborate with the ISO Outreach Committee in engaging and supporting regional meetings to increase awareness about the convention and to do local outreach in support of our goal of increasing the number of COSAs who attend. The possibility of continuing to build on this joint effort to use the annual convention to reach more COSAs who are still suffering is very encouraging.

While we have more uncertainty than usual about what our attendance will ultimately be since the impact on our convention due to SAA's split in their convention and conference is unknown, our registration numbers at the time of this writing are encouraging. Likewise, progress on action items for the 2019 COSA convention in Houston has been timely and on schedule. We envision that our work to create a more streamlined planning process will continue to yield dividends for the next ConCom chair(s) in managing action items and tasks.

We have enjoyed, and feel honored by, the opportunity to be of service in continuing to develop the legacy of fun and ease in putting together our fellowship's largest annual event. Through it all, we have done our best to keep in mind what we feel is perhaps the most sacred role of the ConCom: to create and hold a spiritual space in which Higher Power reveals the miracles of recovery for us all.

## **Literature Committee Annual Report 2018**

The Literature Committee had four main goals in the 2017-2018 service year: continuing work on the basic text; ensuring adequate staffing, training, and support of each member and role; providing growth opportunities through rotation of service; and assisting the ISO in opportunities to grow our literature sales.

During this service year we put a lot of focus on moving the basic text forward. We planned and completed four chapters (Tradition One, Concepts One and Two, and a start to the COSA Tools section). We are pleased to present these chapters at the 2018 Annual Delegate Meeting for the delegates' final approval. This is an important part of the process of keeping the basic text moving forward. It is a large endeavor for COSA that will certainly take many years to complete. We have completed Steps One through Five and hope to have the next four chapters approved this year.

One of the biggest challenges we face is filling critical roles on all of our teams. Many roles require important monthly work or even weekly dedication by team members so keeping key roles filled and having backups is crucial. It's also vital for us to ensure we rotate service to help fill gaps, provide new opportunities, and to keep new ideas coming in from new members. With this in mind, we had several changes in roles which helped the team. We had a new member join as the Balance coordinator. She has done a wonderful job of keeping production on schedule and prioritizing the input of new material from the fellowship regularly. The Literature in Development team welcomed a new coordinator and several new writers. We also had a new editor join our Expedited Review team recently and she is currently learning the process for editing fellowship emails.

In our work to assist the ISO in growing our literature sales, we worked with the board to assess new ideas such as formulating a collected version of the Twelve Step booklets into one large book. This should help to increase sales as well as generate interest in completing the Steps for any new member who might purchase the full book. This project is still in the research phase and will continue through the next service year.

The Literature Committee meets monthly (as needed) yet some teams meet more frequently to keep on target. Below you'll find outlines of their goals for the coming year and openings on each team.

The Balance team has five active members and they published six editions of the *Balance* this service year. In the coming service year, they will continue to focus on six bi-monthly editions. They also plan to do a survey to get the fellowship's input for improvements to the *Balance*, assessing its use and value to COSA members. The team is looking for new writers and editors.

The Literature in Development team has five active members and is looking for new writers, editors, and general members to execute research tasks or work on surveys. This team will be focused on continuing work on the basic text. In the next service year, we plan to draft Steps Six and Seven, Traditions Two and Four, and Concepts Three and Four, as well as some additional

material about COSA Tools. If you are interested in working on the basic text, this team needs you!

The Expedited Review team has three active members: two editors and one coordinator. This team reviews all COSA literature, conference materials, website information, and fellowship emails prior to publication. They also completed an extensive three-year review of the COSA website, ensuring it met writing standards and making recommendations for improvement. In the coming year we are looking for additional editors and, possibly, a coordinator to oversee the team's goals and provide updates. If editing is your thing we've love to hear from you.

## **Nominating Committee Annual Report 2018**

This year's Nominating Committee was comprised of five members. Over the course of this service year, our team held six meetings, completed 59 action items, networked and spoke to numerous qualified COSA members to ask them to consider board service, and sent out the annual fellowship email, *Call for Submissions*, seeking board service nominations.

These combined efforts led to the Nominating Committee securing three willing and qualified candidates for board service. In addition to their recovery and sobriety, each candidate has diverse skills they bring to board service. It's a prime example of how the individuals' gifts combine to make the whole board more effective.

One of this service year's goals was to have a workshop at the Orlando Convention to share what board service entails. A panel of current board members shared their experiences with board service and answered questions from the attendees. The workshop was well attended and several potential candidate discussions developed from it. Our hope was to plant seeds of interest, show first-hand that "garden variety" COSA members can do this work, and to express how rewarding board service is. Great joy and deep recovery comes to those who do this service.

Another goal we completed this year was to contact all the fellowship's intergroups and seek their input for nominees. Intergroup members are in a unique position because they come into contact with many COSA meetings and members. They may recognize members who might be a good fit for board service.

While a major function of the committee is to find qualified board nominees, we also help fill other important service positions. This year we were able to honor the principle of rotation of service for two critical functions: our voicemail responder and email responder. These are often the first points of contact newcomers have with COSA when reaching out. These roles also assist existing COSA members with questions or other needs. Both roles are instrumental to our mission. We are pleased to have had great volunteers step forward to serve and support these important functions.

We are currently looking to fill the position of delegate liaison for the 2019 Houston Convention. If you feel called to support this endeavor or would like more information, please contact us at [nominations@cosa-recovery.org](mailto:nominations@cosa-recovery.org).

As we enter the new service year, the Nominating Committee will continue seeking new people to serve on the board. This rotation of service keeps COSA healthy today and in the future. Those qualified for board service are: COSA members who have worked all Twelve Steps, have a sponsor, and have two years in COSA. Are you interested in serving COSA as a board member? If you're not ready now, please keep your mind and heart open for the future. Until then, please consider volunteering for another service position that would benefit from your unique experience, strength, and hope. The service you give comes with deep, lasting rewards and growth to your personal recovery.

Thank you for letting us be of service.

## **Outreach Committee Annual Report 2018**

At last year's convention in Orlando, a few of us expressed a desire to help with outreach as we knew that the Outreach Committee needed volunteers. With the help of ISO board members Emily and Sandy we began to meet in August of 2017 and were able to identify the following goals for our committee. First, was to carry the message to those who are still suffering by encouraging local outreach to medical professionals and therapists and providing materials free of charge to local groups for their outreach activities. Second, was to encourage more COSAs to attend the convention. Third, was to aid the Convention Committee in doing outreach for the convention. In addition to trying to get the word out by fellowship emails and the *Balance*, we made the decision to make a more direct effort to contact local groups in the host state each year. Fourth was to prepare and print the materials, edit the letters, and get the word out. Because the Outreach Committee had been dormant for a few years, there were no funds budgeted for Outreach, so we made a decision to ask the Intergroups for donations. We are so grateful that the Intergroups came through for us.

We started with five members including two board members, then one person dropped out and we added another member. We held five meetings and completed 29 action items.

### **Accomplishments**

For a small committee we feel that we were able to accomplish a lot. We raised \$800 thanks to the generosity of Houston Intergroup, Northern California Intergroup, Southern California Intergroup, and the Telemeeting Intergroup. The funds were used to print 1,000 business cards and 1,000 convention postcards. Again, we had help here. Kerry M. and Eveline allowed us to use the materials that they had developed for COSA outreach in the past. Because of this help, we were able to save time and effort. One of the first things we did was update the *Letter to Health Care Professionals*. That can be found on the website at: <http://cosa-recovery.org/professionals.html>.

Once we had our materials printed, we prepared a flyer to get the word out about what the Outreach Committee had available and how we were ready to help. We sent the flyer out to Intergroups, individuals associated with Intergroups, placed a copy in the *Balance*, and sent a fellowship email.

In addition to printed materials, we added the outreach materials to the COSA website. They are downloadable and printable. We also added a new outreach feature on the website. Under the *Be of Service* tab, there is now a tab to click on called *Do Outreach*. It's there to help others who wish to join us or do outreach in their local area.

Because the 2018 convention will be held in California, we contacted groups in this state via email or through volunteers from the Convention Committee and asked if they would like to receive business cards or convention cards. In addition to mailing any requested cards, we were able to email sample letters and posters that local groups could customize for their own local outreach. We mailed cards and emailed sample letters and posters to any COSAs who requested them. Also, we were asked to help some of our United Kingdom COSAs to attend a mental health conference in the UK by paying the registration fee for one of them. Funds are also being used for postage. We were able to stay within budget.

### **Vision**

We want to continue carrying the message by duplicating what we did this year: fundraising, printing materials, sending out materials to COSA groups, etc. In the new service year, we will

concentrate on Texas for convention outreach—and we are proudly adding one or two new members from the Houston area.

Another area that we feel needs attention is the Spanish-speaking COSA community. We need to develop short- and long-range goals to reach out to this group of COSAs.

**Service Volunteers Needed**

To do outreach in Texas, we will need volunteers who are willing to distribute convention cards and/or business cards to COSA groups for use in encouraging attendance of the 2019 ISO of COSA Annual Convention. Also, we will need to recruit additional outreach committee members who have the desire to carry the message.

To help the Spanish-speaking COSA community, we need to ask for support for the COSA en Espanol Telemeeting by asking for volunteers to attend the meeting and to translate COSA pamphlets into Spanish. Lastly, and very importantly, we will need the support of the intergroups, COSA groups, and individuals to help provide funds to support our activities for this coming year.

## **Technology Committee Annual Report 2018**

The Technology Committee's oversight includes the maintenance of the COSA website (cosa-recovery.org) including the COSA Online Store, sending emails to the fellowship, converting convention recordings to MP3s, setting up and maintaining the registration page for the convention and Annual Delegate Meeting, maintaining the database of meetings, and various details involved in setting up emails, data storage, and things "techy".

The majority of the work involves maintaining and offering services through the website. At the beginning of the 2017-2018 service year our goals included increasing the number of members on the committee and continuing to support the board and fellowship with technical support. We also wanted to offer more MP3 recordings from earlier convention years.

Since last April, TechCom has sent nearly 100 fellowship emails. This is the primary method of communicating information to the fellowship. Behind the scenes, we have been working on reformatting the fellowship emails. The new format will debut shortly after the Oakland Convention.

We added the Orlando convention recordings to the COSA Online Store (and anticipate adding some pre-2007 recordings available in MP3 before the service year ends). We also continued to offer a one-click purchase of an entire year's convention recordings at a 20% discount.

The Technology Committee oversees the posting of information for the 2018 COSA convention in Oakland, *Rooted in Recovery*. We simplified and combined the delegate and convention registration processes into one streamlined process.

TechCom now oversees the maintenance of the meeting database and updates meeting information on cosa-recovery.org as supplied by our registered meetings. After a delay of a couple of years, we were able to contact all the registered groups to make sure we have the most current meeting information, including contact information for all of the face-to-face, online, and phone meetings. When we finished the information renewal project we had 138 registered COSA meetings; that included 10 new meetings that were not on the website or in the meetings database a year ago.

We continue working with the Literature Committee on the standardization of cosa-recovery.org to meet COSA standards and with all committees to provide website and email services. This year concluded the Literature Committee review of cosa-recovery.org.

Our shared vision for the 2018-2019 service year is to continue with standardization of cosa-recovery.org to meet COSA standards, continue to increase the number of convention MP3s in the COSA Online Store, to enhance the visual impact of fellowship emails, and to continue providing technical support to the board and fellowship.

The Technology Committee is very different from other ISO Committees. We do not have monthly meetings or an ongoing list of action items. TechCom is like a series of cogs where we all work together to accomplish our primary purpose. As we add new TechCom members, we increase the number of cogs and reduce the size of the individual cogs as well. If you would like to be a cog in the Technology Committee, please let us know! We also need non-technical cogs as well.

Thank you for letting us be of service.



## **Resource Development Committee Annual Report 2018**

The Resource Development Committee has been inactive for several years. In October of 2017, Marlane and I (Eric C.) launched an ad hoc fact-finding initiative to speak with experts on planned giving and trusts. I traveled to New Orleans where Marlane had set up a series of appointments with fundraising experts. While there, we took copious notes, came up with some strategies, and decided that a planned giving campaign was something we could potentially do and was worth pursuing. We also learned about other fundraising, stewardship, and resource development ideas and practices, so we took this to the board, which asked us to consider reviving the Resource Development Committee. That had not been our original plan but, it made sense and we agreed.

In December of 2017, we officially reactivated the committee, with Marlane and myself as co-chairs. We have been in frequent contact with the board and each other as we streamline our goals and the tasks we need to accomplish in the coming year, as well as in the long term.

As a newly revived committee, we are still exploring our needs, goals, visions, and structure. Right now, we do not have a formal meeting time or structure, as we are still in the fact-finding phase. We hope to be able to present more specific information in the future via the COSA convention and fellowship emails. Our current focus is mostly on long-term strategies like planned giving through trusts, estates, and IRA contributions. This requires tremendous research and coordination so, we are taking our time to make sure we maintain steady and informed progress in each step of the research, presentation, and decision-making.

At the time of this writing, we have two confirmed COSA members who have named the ISO of COSA as beneficiaries for their estates. We have also been working with a foundation that helps nonprofits receive greater interest on their prudent reserves. Various members of the board have been very active in helping us in our research and also in vetting our ideas with rigorous questioning.

Currently, we do not need additional volunteers but, if anyone has experience in this type of long-term strategic financial planning, estates, trusts, etc. we would love to hear from you.

Thank you!

Eric C.

Co-chair and Board Liaison, Resource Development Committee

**International Service Organization Central Office**  
**Annual Report 2018**

The central office of the ISO of COSA continues to support the fellowship through its focus on providing literature to the fellowship not only in the United States but in countries around the world. This year, orders on the website totaled over \$13,000 with 2,943 items ordered. The largest selling item is our Newcomer's Welcome Packet followed by the COSA medallions. Close behind are *Step One* and our great booklet, *Boundaries*. If you are not familiar with our literature, please visit the COSA Store to see the vast selection of literature which is available.

With the exception of the days immediately following Hurricane Harvey, we have met the goal of shipping all orders within five working days. Our Houston office was not impacted by the storm, however, mail service was disrupted for several weeks. Thank you to all of our fellowship for your patience during those weeks.

The office has meet the goal of fully utilizing QuickBooks to go paperless in our auditing process. This has streamlined the process and made it much easier for our volunteers. Many thanks to those who provide that service. Additionally, this year I have focused on purging the office of paper records that we do not need to retain. This has improved our office organization greatly and will make it easier if our office ever has to move.

My thanks to the fellowship for allowing me to have the opportunity to work in the COSA office and support our fellowship.

Susan K.

**International Service Organization of COSA Balance Sheet  
As of May 15, 2018**

**ISO COSA  
Balance Sheet**

	<u>Total</u>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Bank Accounts</b>	
<b>Bank Accounts</b>	
Chase Money Market - Prudent Reserve	20,004.60
Chase Operational	51,060.96
Chase Payments Account	3,336.44
PayPal	2,763.01
<b>Total Bank Accounts</b>	<u>\$ 77,165.01</u>
<b>Total Bank Accounts</b>	<u>\$ 77,165.01</u>
<b>Other Current Assets</b>	
Pre-Paid Convention Expense	2,000.00
<b>Total Other Current Assets</b>	<u>\$ 2,000.00</u>
<b>Total Current Assets</b>	<u>\$ 79,165.01</u>
<b>Fixed Assets</b>	
Office Equipment	323.00
<b>Total Fixed Assets</b>	<u>\$ 323.00</u>
<b>TOTAL ASSETS</b>	<u>\$ 79,488.01</u>
<b>LIABILITIES AND EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
Accounts Payable	0.00
<b>Total Accounts Payable</b>	<u>\$ 0.00</u>
<b>Other Current Liabilities</b>	
<b>Payroll Liabilities</b>	
A FICA Payable	0.00
B Medicare Payable	0.00
Federal Taxes (941/944)	-61.17
<b>Total Payroll Liabilities</b>	<u>-\$ 61.17</u>
Sales tax payable	-244.63
<b>Total Other Current Liabilities</b>	<u>-\$ 305.80</u>
<b>Total Current Liabilities</b>	<u>-\$ 305.80</u>
<b>Long-Term Liabilities</b>	

Reserves for COSA basic text	10,200.00
<b>Total Long-Term Liabilities</b>	<b>\$ 10,200.00</b>
<b>Total Liabilities</b>	<b>\$ 9,894.20</b>
<b>Equity</b>	
Opening Balance Equity {4}	0.00
Unrestricted Net Assets	52,742.98
Net Income	16,850.83
<b>Total Equity</b>	<b>\$ 69,593.81</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$ 79,488.01</b>

**International Service Organization of COSA  
Profit and Loss  
July 1, 2017 – May 15, 2018**

**ISO COSA  
Profit and Loss**

	<b>Total</b>
<b>Income</b>	
<b>Convention Income</b>	
<b>Convention Donations</b>	
Individual	2.01
Registration Scholarship	390.00
<b>Total Convention Donations</b>	<b>\$ 392.01</b>
Meals	1,206.00
Registration	9,122.50
Sales	114.00
<b>Total Convention Income</b>	<b>\$ 10,834.51</b>
Delegate Registration	1,446.00
<b>Donations</b>	
Automatic Recurring Donations	11,769.00
Group	5,289.95
Individual	4,123.15
Outreach	800.00
Resource Development Committee	90.10
Website Upgrade	290.00
<b>Total Donations</b>	<b>\$ 22,362.20</b>
Interest Income	24.37
Sales	10,321.55
<b>Total Income</b>	<b>\$ 44,988.63</b>
<b>Gross Profit</b>	<b>\$ 44,988.63</b>
<b>Expenses</b>	
<b>Board Expenses</b>	
Board Convention Travel	2,142.00
Board Working Weekend	3,794.14
<b>Total Board Expenses</b>	<b>\$ 5,936.14</b>
<b>Convention Expense</b>	
Hotel	
Room Rental	169.86
<b>Total Hotel</b>	<b>\$ 169.86</b>
<b>Total Convention Expense</b>	<b>\$ 169.86</b>

<b>COSA Committees</b>	
Literature Committee	195.00
<b>Outreach Committee</b>	
Conferences	142.00
<b>Total Outreach Committee</b>	<b>\$ 142.00</b>
<b>Total COSA Committees</b>	<b>\$ 337.00</b>
<b>COSA Products</b>	
Postage/Shipping	1,459.52
Printing	2,786.07
<b>Total COSA Products</b>	<b>\$ 4,245.59</b>
<b>Office Expenses</b>	
<b>Bank Fees</b>	
Foreign Exchange Fees	0.00
<b>Total Bank Fees</b>	<b>\$ 0.00</b>
Insurance	2,044.14
Office Equipment	135.30
Office Supplies	406.16
Phone/Fax Line/internet	262.83
Rent	4,807.56
<b>Total Office Expenses</b>	<b>\$ 7,655.99</b>
<b>Payroll Expenses</b>	
ADP/ QB fees	697.50
Taxes	398.98
Wages	5,215.50
<b>Total Payroll Expenses</b>	<b>\$ 6,311.98</b>
Spring Branch ISD	54.19
Staff Travel Expenses	382.80
State of kentucky	15.00
Taxes Harris County	170.34
<b>Technology Fees</b>	
Authnet Gateway Fee	110.00
Getsy/Fetchapp	90.00
Mail Chimp	292.31
Paymentech fees	1,226.28
PayPal Fees	514.56
Shopify Fees	414.39
Website Fees	211.37
<b>Total Technology Fees</b>	<b>\$ 2,858.91</b>
<b>Total Expenses</b>	<b>\$ 28,137.80</b>
<b>Net Operating Income</b>	<b>\$ 16,850.83</b>
<b>Net Income</b>	<b>\$ 16,850.83</b>

**International Service Organization of COSA  
Board of Trustees**

**Vision for 2018-2019**

During the 2017-2018 service year we witnessed a real “growth spurt” in the spirit of volunteerism and willingness to be of service from all across the fellowship. In addition to three COSA members stepping up for board service, and the filling of a variety of service positions throughout the fellowship, two dormant committees were reinvigorated by willing COSA members. The two committees, Outreach and Resource Development, were each restarted by COSA members who connected at the convention in Orland and, although living states and time zones apart, came together with smart, actionable growth plans. We hope to continue to foster this spirit in the coming service year. It is vital to COSA’s growth.

Volunteers are part of the spiritual fuel that makes COSA run. Being of service is also part of the spiritual fuel that deepens individual recovery. This is one of the purest expressions of “win-win” we know of.

In this annual report you can read about the progress of each COSA committee. You’ll get all the facts. You’ll see the quantifiable achievements. But what the reports *don’t* show are the joys, rewards, and spiritual growth each individual COSA member experienced while serving on their respective committee. The reports don’t touch on the fact that the committee members bonded with one another and friendships were born. The reports don’t show how each individual’s personal recovery grew and deepened through service. So, enjoy reading the reports—but while you’re here at the convention, look beyond the data. With the exception of one part-time paid employee this entire convention has been breathed into life by volunteers. Talk to some of them and get their stories. It’s truly inspiring.

COSA’s continued, healthy growth requires lots of hands and voices. We’ll need more people willing to be of service in all kinds of roles. Our *Concepts of Service* is our guidebook to creating sober, healthy environments in which to carry out service work. Roles are clearly defined, and volunteers get support along the way. COSA service is rewarding work and no one has to feel alone.

We hope to foster an environment that invites even more COSAs to be willing to be of service.